

Legal work streams

Drive efficiencies in day-to-day legal work through effective work stream management



Legal work streams

The challenge for in-house teams

When considering the approach to managing legal work streams – namely the day-to-day performance of legal work – it can be difficult to know where to start. The diverse nature of each work stream, the number of competing priorities across the Legal function, limited budget and lack of enabling technology, means GCs need to be strategic and prioritise where to spend their time and resources.

Work streams may include:

Contract lifecycle management	Compliance and risk management
Litigation management – including eDiscovery	Mergers and acquisitions
IP management	Delegations of authority

It is no surprise therefore, that research shows that many in-house teams lack the operational infrastructure to effectively manage their legal work streams. In particular, legal teams often lack documented processes for key workstreams, centralised databases to manage templates, precedents and other knowledge, technology tools that effectively support people and processes, and data to inform strategic decision making.

A common misconception is that each legal work stream requires a bespoke point solution and that implementing more robust processes and governance would be costly and time consuming. Whilst this may be true in some instances, the benefits of improved management of legal work streams often far outweigh the costs: from improved data analytics and risk management to better utilisation of resources and control over budgets. We are also seeing a trend in the market, towards the optimisation of existing technology and use of enterprise solutions, which can – when underpinned by appropriate processes and governance – improve collaboration with business stakeholders, eliminate data silos, and reduce change fatigue.

Did you know

Over 70%

of in-house teams do not have or effectively use centralised and searchable precedent databases for common contracts

Over 40%

of in-house teams do not have or maintain an IP register

Less than half

of in-house teams say they have consistent procedures for subpoenas, legal holds and authority to commence and settle litigation

The majority

of in-house teams lack the internal capacity to handle eDiscovery requests

Work stream management

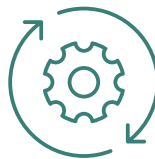
Seven considerations for managing legal work streams

When planning your approach to the management of legal work streams, the following seven considerations will help you get started.



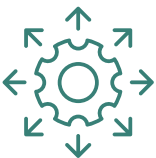
Roadmap

- What are your key challenges, strategic priorities and operational constraints?
- Do you have a roadmap which prioritises your legal operations initiatives, including any required technology investments?



Process

- Once you have identified the work streams which you wish to prioritise, have you mapped your relevant 'as is' and 'to be' processes in relation to each work stream?
- Is the process necessary and can it be optimised? Remember, don't optimise something that should not exist!



Workflow and delegations

- What workflows within the broader process do you need?
- Can these workflows be automated?
- What governance, delegations, approvals are required?



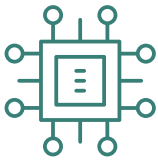
Knowledge management

- Where will precedents, work product and other knowledge in relation to the process be stored?
- Who will need to access this knowledge?
- Who will maintain this once developed?



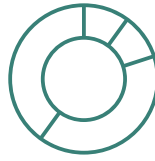
Resourcing

- What resources do you need to support the process?
- Are any specialist skills required?
- What skills do you have within your team?
- Should the work be outsourced or offshored?



Technology

- Could your resources or process be supported by technology?
- Do you have existing technology which can be optimised or is a new tool required?
- How will a new tool integrate with the rest of your tech stack and other processes?
- Do you have the required skills and/or resources to select, implement, manage and support the required technology?
- How will your selected tool meet your data, analytics and reporting needs?



Data and analytics

- What data do you need to collect, analyse and store in relation to the process?
- What reporting requirements do you need to meet (content, cadence and format)?
- What decisions will this data enable you to make?

Technology as an enabler

Selecting the right solution for your needs

The legal technology market is saturated with different solutions for each individual legal work stream and it can be difficult to cut through the 'sales pitch' and technical jargon to select the right tool for the right process. Another challenge GCs face is ensuring that their legal technology stack is future fit – particularly in an environment characterised by increasing complexity, rapid change, volatility and uncertainty.

Although there are many use cases for point solutions, we are seeing a trend in the market towards the adoption of enterprise solutions, to reduce approvals needed for implementation and associated change fatigue, aid integration between systems, manage costs and eliminate data silos.

Both solutions have their benefits and drawbacks so it is important to understand these differences to determine which might be most appropriate for the problem you are trying to solve.

Enterprise solutions

Designed for multiple use cases – provides the 'building blocks' for tailored solutions.

Highly customisable.

Often low-code/no-code platforms – reduced reliance on third party vendors.

Usually not targeted at Legal. Not always fit for purpose for legal departments.

May be easier to collaborate with business where solution used more widely.

Fewer Infosec requirements where the tool is already onboarded.

Easily scalable for large organisations due to seamless integration and code flexibility.

Single vendor to manage.

Point solution

Designed to tackle a single, specialist work stream or related work streams.

Limited options for customisation outside of primary use case. Requires further investment and reliant on third party vendor for development.

Targeted at Legal and built by experts within a particular field. Geared towards solving a particular problem – vendor can focus on delivering it well and keeping abreast of market trends.

Can be challenging to integrate seamlessly with existing tech stack. May require additional APIs.

Infosec requirements could delay implementation.

Some tools may limit scalability due to hard-coded configurations.

Multiple vendors to manage.

An example of how an enterprise solution could be used to manage legal workflows



Data

Connect to your data source(s)

Software

Google Drive, Microsoft Sharepoint, Microsoft Excel, Dropbox



Process

Create an automated process

Software

Power Automate



Collaborate

Set up alerts and manage projects

Software

Microsoft Teams, Microsoft Outlook, Microsoft Project, Microsoft Planner



Analyse

Track and review data

Software

Microsoft Power BI



Optimise*

Build an app to further streamline the legal work stream

Software

Microsoft Power Apps



Start by automating the manual process which is your biggest time drain. Once you have rolled it out and proven the value, you can build out other work streams from there.

You will quickly see the value a simple automation can bring.

Next steps

How we can help you

Consulting services may include:

Health check assessment	Using our proprietary Legal Operations Health Check tool, you can assess your legal team against 10 dimensions of legal operations and benchmark yourself against legal teams across various industries. You will receive an insights report following the assessment enabling you to identify strengths and development areas and prioritise initiatives across multiple work streams.
Contract process mapping taxonomy development	Mapping of your contract lifecycles (as is and to be) and developing a contract taxonomy, laying the foundation for the selection and implementation of your CLM system.
Contract playbook workshops	Applying design thinking principles and leveraging our global network of lawyers to develop your playbook processes, methodology and templates.
Migration of legacy contracts	Using AI to identify and extract key data points and migrate legacy contracts using NRF's automated migration tool, eliminating costly and error-prone manual data entry processes.
Technology advisory, development and implementation	Helping you select, pilot and implement technology tools to support your people and processes. This could include optimisation of existing tools, selection of third-party point or enterprise solutions or the development of bespoke tools.
KPIs and analytics	Helping you determine what KPIs you should measure for your work streams and implementing selected analytics systems and processes. Building dashboards and reporting templates to enable you to track, measure and report on key metrics across workstreams, evidencing your department's value to the business.
Change management	Facilitating or supporting required change management processes to build consensus with stakeholders and embed new processes, tools and technologies. Often overlooked, effective change management can increase the likelihood of a successful outcome. This may include designing a change management roadmap, conducting workshops with impacted employees, helping you communicate the benefits of the change to the wider business or creating feedback mechanisms.
Advisory aetainer	Providing strategic advice to support you across a diverse range of matters, when you need it most. This can be delivered via a hotline or through regular calls with you and your team, offering you a high degree of flexibility along with budget certainty.



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Tammy, a Managing Consultant, was formerly the Group Company Secretary and Senior Legal Advisor for Zurich Insurance’s Southern African operations. With over 18 years experience within the professional services, corporate and start up environments, Tammy has extensive expertise in corporate governance, stakeholder management, strategy formulation, operational design and delivering business transformation projects.

NRF Transform is our global change and innovation programme. It aims to make how we deliver traditional services more effective and efficient, and to provide entirely new solutions to our client’s most pressing business problems. It has over 150 staff in offices around the world, as well as three dedicated Hubs, and includes teams focusing on Applied Technology, Innovation, Legal Design, Legal Project Management, Legal Operations Consulting, Resource Management, and Commercial Management.

The Legal Operations Consulting Practice helps General Counsels and in-house legal teams optimise the delivery of legal services to their organisations, enabling them to go beyond managing legal risk and become a strategic business partner, supporting the wider objectives of the business.

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